



Assessment of Professional Competence

APC Requirements and Competencies

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How to use this guide

Section one

- introduces the Assessment of Professional Competence (APC)
- explains the purpose and structure of competencies
- provides guidance on choosing your competencies

Section two

- lists the mandatory competencies, each APC pathway and its technical competencies

Section three

- defines, in alphabetical order, the individual competencies

Section four

- provides details of where you can find out more about the APC, plus details of the support services offered by RICS

Introduction

About the APC

The APC ensures that potential members are competent to practise and meet the high standards of professionalism required by RICS to become a chartered surveyor.

The APC is based on candidates achieving a set of requirements or competencies. These are a mix of technical and professional practice, interpersonal, business and management skills.

The competencies undertaken will depend on the APC pathway. Each pathway has both mandatory and technical competencies.

About the competencies

To be competent to practise as an RICS Member you must have the skill or ability to perform a variety of tasks or functions. The RICS competencies are not only a list of tasks or functions, they are also based upon attitudes and behaviours.

RICS has drawn up the technical competencies in a generic way so that they can be applied to different areas of practice and geographical locations. It is important that you interpret them within the context of your own area of practice or specialism and geography.

Each competency is defined at three levels of attainment. You must reach the required level in a logical progression and in successive stages.

- **Level 1** knowledge and understanding
- **Level 2** application of knowledge and understanding
- **Level 3** reasoned advice and depth of technical knowledge.

The competencies are in three distinct categories

- **Mandatory competencies** – personal, interpersonal, professional practice and business skills common to all pathways and compulsory for all candidates.
- **Core competencies** – primary skills of your chosen APC pathway.
- **Optional competencies** – selected as additional skill requirements for your APC pathway from a list of competencies relevant to that pathway. In most cases there is an element of choice.

Choosing your competencies

It is important that you give careful thought to your choice and combination of competencies. Your choice will inevitably reflect the work you do in your day-to-day environment (driven by the needs of your clients/employer). Your choice and combination of competencies will be a reflection of your judgement.

At the final assessment interview, the assessors will take these choices into account. They will expect you to present a sensible and realistic choice that reflects the skills needed to fulfil the role of a professional in your area of practice.

Other guidance

You should read the following guides in conjunction with this document

- your chosen pathway guide
- the candidate guide

Visit rics.org/pathway to download your pathway guide.

Visit rics.org/apcguides to download your candidate guide and supporting documents.

APC pathway requirements

Mandatory competencies

All candidates must achieve the defined level of the mandatory competencies.

These competencies are a mix of the professional practice, interpersonal, business and management skills that are considered common to, and necessary for, all professional members.

You must achieve these minimum standards.

to Level 3

- Conduct rules, ethics and professional practice

to Level 2

- Client care
- Communication and negotiation
- Health and safety

to Level 1

- Accounting principles and procedures
- Business planning
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Sustainability
- Teamworking

An APC pathway may include a mandatory competency. If so it will be shown in the core or optional technical competency list for that pathway and will need to be achieved to a higher level than as a mandatory competency.

Senior professional assessment

For senior professional assessment these additional competencies must also be achieved.

to Level 2

- Leadership
- Managing people
- Managing resources (excluding human resources)

Arts and antiques

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

If you wish to become an RICS Registered Valuer you must take Valuation to Level 3.

Core competencies

Level 3

- Object identification
- Research methodologies and techniques

Level 2

- Valuation [* or Level 3]

Level 1

- Auctioneering

Optional competencies

Three competencies to Level 3 and **one** to Level 2 from the list below

- Auctioneering
- Capital taxation
- Conservation and restoration
- Insurance
- Purchase and sale
- Accounting principles and procedures **or** Business planning **or** Communication and negotiation (the latter must be taken to Level 3)

* If Valuation is taken as a Level 3 core competency then the optional competency requirements are **two** at Level 3 and **one** at Level 2 plus **two** competencies to Level 2 from the full list of technical competencies.

Building control

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Building control inspections
- Environmental audit (and monitoring)
- Fire safety
- Inspection
- Legal/regulatory compliance

Optional competencies

One competency to Level 3 and **one** competency to Level 2 from the list below.

- Analysis of client requirements
- Building pathology
- Building information modelling (BIM)
- Conservation and restoration
- Construction technology and environmental services
- Contaminated land
- Measurement of land and property
- Planning
- Property records/information systems
- Risk management
- Sustainability
- Works progress and quality management

Plus **one** competency to Level 2 from the full list of technical competencies, including any not already chosen from the list above.

Building surveying

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Building pathology
- Construction technology and environmental services
- Contract administration
- Design and specification
- Inspection
- Legal/regulatory compliance

Optional competencies

Three competencies to Level 2 from the list below

- Analysis of client requirements
- Building information modelling (BIM)
- Commercial management of construction
- Conflict avoidance, management and dispute resolution procedures
or Health and safety (must be taken to Level 3) **or** Sustainability
- Conservation and restoration
- Contract practice
- Design economics and cost planning
- Development/project briefs
- Fire safety
- Housing maintenance, repair and improvements **or** Maintenance management
- Insurance
- Measurement of land and property
- Project financial control and reporting

- Quantification and costing of construction works
- Risk management
- Works progress and quality management

Built infrastructure

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Engineering science and technology

Plus **three** at Level 3 from the list below.

- Analysis of client requirements*
- Contract practice
- Cost prediction and analysis
- Procurement and tendering
- Programming and planning
- Project controls
- Risk management

Optional competencies

One competency at Level 3 (in addition to those chosen as a core competency).

- Contract practice
- Programming and planning
- Quantification, costing and price analysis

Two at Level 2

- Analysis of client requirements*
- Asset management
- Building information modelling (BIM) management
- Cross cultural awareness in global business
- Project audit
- Project funding and finance
- Risk management
- Stakeholder management
- Supplier management
- Sustainability

* If you select analysis of client requirements to Level 3 from the core competencies you cannot select as an optional competency.

Note: Candidates should select from one of the following fields of work in which to demonstrate their competency:

- Energy: including utilities, renewable sources and nuclear
- Mining and resources
- Oil and gas
- Petro-chemicals
- Transport: including road, rail, aviation and ports.

Commercial property practice

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

If you wish to become an RICS Registered Valuer you must take Valuation to Level 3.

Core competencies

Level 3

- Inspection

Level 2

- Measurement of land and property
- Valuation [or Level 3*]

Optional competencies

Three competencies to Level 3* from the list below.

- Access and rights over land
- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- Auctioneering
- Building information modelling (BIM)
- Building pathology
- Capital taxation
- Compulsory purchase and compensation
- Contaminated land
- Corporate real estate management
- Development appraisals
- Indirect investment vehicles
- Insurance
- Investment management [including fund and portfolio management]
- Landlord and tenant [including rent reviews and lease renewals]
- Leasing/letting

- Local taxation/assessment
- Planning
- Property finance and funding
- Property management
- Property management accounting
- Property records and information systems
- Purchase and sale
- Strategic real estate consultancy

Plus **one** competency to Level 3 or **two** competencies to Level 2 including any not already chosen from the list above **or** from the full list of technical competencies.

* If valuation is taken to Level 3 the requirements are as follows;
From the optional competency list you must select **two** at Level 3 and **one** at Level 2
plus
From the full list of technical competencies you must select **one** to Level 3 or **two** at Level 2

Environment

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Inspection
- Sustainability

Level 2

- Measurement of land and property

Optional competencies

Two competencies to Level 3 from the list below.

- Contaminated land
- Environmental assessment
- Environmental audit (and monitoring)
- Environmental management
- Environmental science and processes
- Laboratory procedures
- Legal/regulatory compliance
- Management of the built environment
- Management of the natural environment and landscape

Plus **three** competencies to Level 2 from the full list of technical competencies, including any not already chosen from the list above.

Facilities management

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Two competencies to Level 3 and **two** competencies to Level 2 from the list below.

- Analysis of client requirements
- Corporate real estate management
- Maintenance management
- Procurement and tendering
- Project financial control and reporting
- Supplier management

Optional competencies

One competency to Level 3 and **two** competencies to Level 2 from the list below (including any core competencies not already chosen).

- Building information modelling (BIM)
- Conflict avoidance, management and dispute resolution procedures **or** Health and safety (must be taken to Level 3) **or** Sustainability
- Construction technology and environmental services
- Consultancy services
- Contract administration
- Contract practice
- Design and specification
- Environmental management
- Fire safety
- GIS
- Landlord and tenant (including rent reviews and lease renewals)
- Project audit

- Property management
- Strategic real estate consultancy
- Works progress and quality management

Plus **one** competency to Level 2 from the full list of technical competencies, including any not already chosen from the lists above.

Geomatics (including hydrographic)

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Three competencies to Level 3 from the list below.

- Cadastre and land management
- Engineering surveying*
- Geodesy
- GIS
- Hydrographic (marine) surveying**
- Mapping
- Measurement of land and property
- Property records/information systems
- Remote sensing and photogrammetry
- Spatial data capture and presentation (advanced mapping)
- Surveying land and sea
- Use of the marine environment

Optional competencies

Three competencies to Level 2 from the list below (including any core competencies not already chosen).

- Access and rights over land
- Analysis of client requirements
- Building information modelling (BIM)
- Construction technology and environmental services
- Consultancy services
- Development/project briefs
- Environmental assessment
- Ground engineering and subsidence
- Legal/regulatory compliance
- Management of the natural environment and landscape
- Planning
- Project administration

Plus **one** competency to Level 2 from the full list of technical competencies, including any not already chosen from the lists above.

* If you are following the pathway to chartered engineering surveyor you must include the engineering surveying competency to Level 3 amongst your core competencies.

** If you are following the pathway to chartered hydrographic surveyor you must include hydrographic (marine) surveying competency to Level 3 amongst your core competencies.

Management consultancy

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Business planning
- Consultancy services
- Strategic real estate consultancy

Optional competencies

Two competencies to Level 3 and **one** competency to Level 2 from the list below.

- Analysis of client requirements
- Corporate finance
- Corporate real estate management
- Corporate recovery and insolvency
- Development appraisals
- Development/project briefs
- Economic development
- Managing resources
- Option appraisal
- Programming and planning
- Project evaluation
- Property finance and funding
- Research methodologies and techniques

Plus **one** competency to Level 2 from the full list of technical competencies, including any not already chosen from the list above.

Minerals and waste management

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Minerals management **or** waste management

Plus **three** competencies to Level 3 from the list below

- Environmental assessment
- Environmental audit (and monitoring)
- Ground engineering and subsidence
- Inspection
- Landlord and tenant (including rent reviews and lease renewals)
- Legal/regulatory compliance
- Local taxation/assessment
- Mapping
- Planning
- Valuation

Level 2

- Legal/regulatory compliance

Optional competencies

Two competencies to Level 2 from the list below (including any core competencies not already chosen).

- Consultancy services
- Contaminated land
- Contract administration
- Development appraisals
- Development/project briefs
- Risk management
- Sustainability
- Works progress and quality management

Plus **one** competency to Level 2 from the full list of technical competencies, including any not already chosen from the lists above.

Planning and development

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

If you wish to become an RICS Registered Valuer you must take Valuation to Level 3.

Core competencies

Level 3

- Development appraisals
- Planning

Level 2

- Legal/regulatory compliance
- Valuation [* or level 3]

Level 1

- Mapping
- Measurement of land and property

Optional competencies

Two competencies to Level 3 from the list below.

- Access and rights over land
- Cadastre and land management
- Compulsory purchase and compensation
- Development/project briefs
- Economic development
- Housing strategy and provision
- Leasing/letting
- Management of the built environment
- Purchase and sale
- Sustainability

Plus **one** competency to Level 3 or **two** competencies to Level 2 from the full list of technical competencies, including any not already chosen from the list above.

* If valuation is taken to Level 3 the requirements are as follows;
From the optional competency list you must select **one** at Level 3 and **one** at Level 2
plus
From the full list of technical competencies you must select **one** to Level 3
or
two at Level 2

Project management

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Contract practice
- Managing people
- Procurement and tendering
- Programming and planning

Level 2

- Construction technology and environmental services
- Leadership
- Project administration
- Project process and procedures
- Risk management

Optional competencies

Three competencies to Level 2 from the list below.

- Commercial management of construction
- Development appraisals
- Development/project briefs
- Project audit
- Project evaluation

Property finance and investment

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

If you wish to become an RICS Registered Valuer you must take Valuation to Level 3.

Core competencies

Three competencies to Level 3 and **one** competency to Level 2 from the list below.

- Financial modelling
- Inspection
- Investment management (including fund and portfolio management)
- Property finance and funding

Level 1

- Valuation

Optional competencies

One competency to Level 3 and **one** competency to Level 2 from the list below.

- Accounting principles and procedures
- Capital taxation
- Corporate finance
- Development appraisals
- Indirect investment vehicles
- Landlord and tenant (including rent reviews and lease renewals)
- Leasing/letting
- Local taxation/assessment
- Property management
- Purchase and sale
- Research methodologies and techniques
- Strategic real estate consultancy
- Valuation

Plus **one** competency to Level 2 from the full list of technical competencies, including any not already chosen from the list above.

Quantity surveying and construction

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Commercial management of construction
or Design economics and cost planning*
- Contract practice
- Construction technology and environmental services
- Procurement and tendering
- Project financial control and reporting
- Quantification and costing of construction works

Optional competencies

Two competencies at Level 2 from the list below.

- Building Information modelling (BIM)
- Capital allowances
- Commercial management of construction **or** Design economics and cost planning (whichever is not selected as a core competency)*
- Conflict avoidance, management and dispute resolution procedures
or Sustainability
- Contract administration
- Corporate recovery and insolvency
- Due diligence
- Insurance
- Programming and planning
- Project evaluation
- Risk management

Select from one of the following fields of work in which to demonstrate your competence:

- Civil engineering
- Construction
- Mechanical and electrical installations
- Oil / gas installations
- Petro-chemicals
- Railways

Other fields may be accepted, subject to written approval from RICS.

* If you are a contractor choose commercial management of construction to Level 3. If you are a quantity surveyor working for a private practice choose design economics and cost planning to Level 3.

Research

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Analysis of client requirements
- Data management
- Research methodologies and techniques

Optional competencies

Five competencies to Level 1 from the core and optional competency lists for your chosen APC pathway.

Plus **one** competency to Level 2 and **two** competencies to Level 1 from the full list of technical competencies

You must demonstrate competence in research that is applied to the delivery of solutions to a wide range of projects, employing a range of approaches and relating to a number of locations. The research must be relevant to your chosen APC pathway.

Residential

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

If you wish to become an RICS Registered Valuer you must choose Valuation to Level 3.

Core competencies

Three competencies to Level 3 and **two** competencies to Level 2.

- Housing aid or advice
- Housing maintenance, repair and improvements
- Housing management and policy
- Housing strategy and provision
- Inspection
- Leasing/letting
- Measurement of land and property
- Purchase and sale
- Valuation

Optional competencies

One competency to Level 3 and **two** competencies to Level 2 from the list below:

- Auctioneering
- Building pathology
- Capital taxation
- Compulsory purchase and compensation
- Conflict avoidance, management and dispute resolution procedures **or** sustainability
- Contaminated land
- Development appraisals
- Environment assessment
- Housing aid or advice

- Housing maintenance, repairs and improvements
- Housing management and policy
- Housing strategy and provision
- Indirect investment vehicles
- Investment management (including fund and portfolio management)
- Landlord and tenant (including rent reviews and lease renewals)
- Land use and diversification
- Leasing/letting
- Local taxation/assessment
- Maintenance management
- Measurement of land and property
- Planning
- Property finance and funding
- Property management
- Property management accounting
- Property records/information systems
- Purchase and sale
- Valuation

If you select a core competency to Level 3 you can not select the same competency as an optional competency.

Rural

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

If you wish to become an RICS Registered Valuer you must choose Valuation to Level 3.

Core competencies

One competency to Level 3 from the list below.

- Agriculture*
- Management of the natural environment and landscape
- Property management
- Valuation

Optional competencies

Three competencies to Level 3 and **two** competencies to Level 2 from the list below, including any core competencies not already chosen.

- Access and rights over land
- Accounting principles and procedures **or** Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- Agriculture¹
- Auctioneering
- Capital taxation
- Compulsory purchase and compensation
- Development appraisals
- Forestry and woodland management
- Investment management (including fund and portfolio management)
- Landlord and tenant (including rent reviews and lease renewals)
- Land use and diversification
- Planning
- Property finance and funding

- Purchase and sale
- Strategic real estate consultancy

Plus **one** competency to Level 3 or **two** competencies to Level 2 from the full list of technical competencies, including any not already chosen from the lists on this page.

* If you do not select Agriculture as your core competency you must select it as one of your optional competencies to either Level 3 or Level 2.

Taxation allowances

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Accounting principles and procedures
- Capital allowances
- Construction technology and environmental services
- Quantification and costing of construction works
- Valuation

Level 2

- Contract practice

Optional competencies

Two competencies to Level 2 from the list below.

- Capital taxation
- Contaminated land
- Design economics and cost planning
- Development appraisals
- Due diligence
- Insurance
- Property finance and funding
- Property management accounting
- Risk management
- Sustainability

Valuation

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Inspection
- Valuation

Level 2

- Measurement of land and property

Optional competencies

Three competencies to Level 3 and **one** competency to Level 2 from the list below or **two** competencies to Level 3 and **three** competencies to Level 2.

- Access and rights over land
- *Accounting principles and procedures, **or** Conflict avoidance, management and dispute resolution procedures **or** Sustainability
- *Auctioneering
- Building pathology
- *Capital taxation
- *Compulsory purchase and compensation
- Contaminated land
- Corporate real estate management
- *Corporate recovery and insolvency
- Development appraisals
- Indirect investment vehicles
- *Insurance
- *Investment management (including fund and portfolio management)
- Landlord and tenant (including rent reviews and lease renewals)
- *Leasing/letting

- *Local taxation/assessment
- Planning
- Property finance and funding
- Property management
- Property management accounting
- Property records/information systems
- *Purchase and sale
- Strategic real estate consultancy
- Valuation of businesses and intangible assets

Candidates who plan to specialise in **machinery and business assets** (as part of their optional competencies) **must** ensure they choose **two** competencies with * next to it, **to Level 3**.

Candidates planning to specialise in **Residential survey and valuation** must complete building pathology to Level 3.

Candidates are advised against choosing strategic real estate consultancy and corporate real estate management together as optional competencies.

Valuation of businesses and intangible assets

Mandatory competencies

You must achieve the minimum levels as set out in the mandatory competencies.

Core competencies

Level 3

- Accounting principles and procedures
- Asset identification and assessment
- Valuation of businesses and intangible assets
- Valuation reporting and research

Optional competencies

One competency to Level 3 or **two** competencies to Level 2 from the list below

- Capital allowances
- Compulsory purchase and compensation
- Corporate finance
- Corporate recovery and insolvency
- Purchase and sale
- Taxation

Competency definitions

Mandatory competencies

- Accounting principles and procedures
- Business planning
- Client care
- Communication and negotiation
- Conduct rules, ethics and professional practice
- Conflict avoidance, management and dispute resolution procedures
- Data management
- Health and safety
- Sustainability
- Teamworking

Accounting principles and procedures

Level 1

Demonstrate knowledge and understanding of accounting concepts and the format and preparation of management and company accounts, including profit and loss statements, cash flow statements and balance sheets.

Level 2

Provide evidence of interpretation of company accounts and balance sheets in your area of practice and application of appropriate accounting and regulatory standards.

Level 3

Provide evidence of reasoned advice given to clients with regard to profit and loss statements and balance sheets.

Business planning

Level 1

Demonstrate knowledge and understanding of how business planning activities contribute to the achievement of your corporate objectives.

Level 2

Provide evidence of application of the principles and demonstrate your ability to use the tools of business planning appropriate to your area of practice.

Level 3

Provide evidence of reasoned advice given to clients and others of the principles and tools of business planning and be able to evaluate your performance and outcomes.

Client care

Level 1

Demonstrate knowledge and understanding of the principles and practice of client care including:

- the concept of identifying all clients/colleagues/third parties who are your clients and the behaviours that are appropriate to establish good client relationships
- the systems and procedures that are appropriate for managing the process of client care, including complaints
- the requirement to collect data, analyse and define the needs of clients.

Level 2

Provide evidence of practical application of the principles and practice of client care in your area of practice.

Level 3

Provide evidence of reasoned advice given to clients and others.

Communication and negotiation

Level 1

Demonstrate knowledge and understanding of effective oral, written, graphic and presentation skills including the methods and techniques that are appropriate to specific situations.

Level 2

Provide evidence of practical application of oral, written, graphic and presentation skills that are appropriate in a variety of situations, specifically including where negotiation is involved.

Level 3

Provide evidence of evaluation of your communication in a variety of situations.

Conduct rules, ethics and professional practice

Level 1

Demonstrate knowledge and understanding of the role and significance of RICS and its functions. Also an appreciation of your personal professional role and society's expectations of professional practice and RICS Rules of Conduct and conduct regulations, including the general principles of law and the legal system, as applicable in your country of practice.

Level 2

Provide evidence of practical application in your area of practice, being able to justify actions at all times and demonstrate personal commitment to the RICS Rules of Conduct and ethical standards.

Level 3

Provide evidence of application of the above in your area of practice in the context of advising clients.

Visit [rics.org/regulation](https://www.rics.org/regulation) for more detail on the RICS Rules of Conduct and RICS ethical standards.

Conflict avoidance, management and dispute resolution procedures

Level 1

Demonstrate knowledge and understanding of the techniques for conflict avoidance, conflict management and dispute resolution procedures including for example adjudication and arbitration, appropriate to your APC pathway.

Level 2

Provide evidence of practical application in your area of practice having regard to the relevant law.

Level 3

Provide evidence of the application of the above in the context of advising clients in the various circumstances referred to above.

Data management

Level 1

Demonstrate knowledge and understanding of the sources of information and data, and of the systems applicable to your area of practice, including the methodologies and techniques most appropriate to collect, collate and store data.

Level 2

Provide evidence of practical application in your area of practice and understand the relevance of information gathered and the uses to which it can be applied. Analyse the information and data collected.

Level 3

Provide evidence of reasoned advice given to clients and others on the use and practical application of the information collected and systems used, and/or specify the most appropriate way for your own and/or a client organisation to collect, analyse and apply relevant information and data.

Health and safety

Level 1

Demonstrate knowledge and understanding of the principles and responsibilities imposed by law, codes of practice and other regulations appropriate to your area of practice.

Level 2

Provide evidence of practical application of health and safety issues and the requirements for compliance, in your area of practice.

Level 3

Provide evidence of reasoned advice given to clients and others on all aspects of health and safety, including undertaking a risk assessment.

Sustainability

Level 1

Demonstrate knowledge and understanding of why and how sustainability seeks to balance economic, environmental and social objectives at global, national and local levels, in the context of land, property and the built environment.

Level 2

Provide evidence of practical application of sustainability appropriate to your area of practice, and of awareness of the circumstances in which specialist advice is necessary.

Level 3

Provide evidence of reasoned advice given to clients and others on the policy, law and best practice of sustainability, in your area of practice.

Teamworking

Level 1

Demonstrate knowledge and understanding of the principles, behaviour and dynamics of working in a team.

Level 2

Provide evidence of practical application of working as a team member in your area of practice.

Level 3

Provide evidence of evaluation of your teamworking skills in a variety of situations.

Additional mandatory competencies for Senior Professionals

For the senior professional assessment to membership, candidates must also be able to demonstrate these competencies to Level 2 in addition to the standard mandatory competencies.

- Leadership
- Managing people
- Managing resources (excluding human resources)

Leadership

Level 1

Demonstrate knowledge and understanding of the characteristics and behaviour of a leader.

Level 2

Provide evidence of application of your role as a leader appropriate to your area of practice.

Level 3

Provide evidence of evaluation of your leadership role.

Managing people

Level 1

Demonstrate knowledge and understanding of the principles and practice of managing people.

Level 2

Provide evidence of the application of the skills required to manage people.

Level 3

Provide evidence of the evaluation of your people management skills.

Managing resources (excluding human resources)

Level 1

Demonstrate knowledge and understanding of the resources required and their cost for the effective operation of a business.

Level 2

Provide evidence of the application in your area of practice, giving reasoned advice on the most effective use, allocation and cost of resources.

Level 3

Provide evidence of the evaluation of managing resources in specific business cases.

Technical competencies

- Access and rights over land
- Agriculture
- Analysis of client requirements
- Asset identification and assessment
- Asset management
- Auctioneering
- Building control inspections
- Building information modelling (BIM) management
- Building pathology
- Cadastre and land management
- Capital allowances
- Capital taxation
- Commercial management of construction
- Compulsory purchase and compensation
- Conservation and restoration
- Construction technology and environmental services
- Consultancy services
- Contaminated land
- Contract administration
- Contract practice
- Corporate finance
- Corporate real estate management
- Corporate recovery and insolvency
- Cost prediction and analysis
- Cross cultural awareness in global business
- Design and specification
- Design economics and cost planning
- Development appraisals
- Development/project briefs
- Due diligence
- Economic development
- Engineering science and technology
- Engineering surveying
- Environmental assessment
- Environmental audit (and monitoring)
- Environmental management
- Environmental science and processes
- Finance modelling
- Fire safety
- Forestry and woodland management
- Geodesy
- GIS
- Ground engineering and subsidence
- Housing aid or advice
- Housing maintenance, repair and improvements
- Housing management and policy
- Housing strategy and provision
- Hydrographic (marine) surveying
- Indirect investment vehicles
- Inspection
- Insurance
- Investment management (including fund and portfolio management)
- Laboratory procedures
- Landlord and tenant (including rent reviews and lease renewals)
- Land use and diversification
- Leasing/letting
- Legal/regulatory compliance
- Local taxation/assessment
- Maintenance management
- Management of the built environment
- Management of the natural environment and landscape
- Mapping

- Measurement of land and property
- Minerals management
- Object identification
- Option appraisal
- Planning
- Procurement and tendering
- Programming and planning
- Project administration
- Project audit
- Project controls
- Project evaluation
- Project financial control and reporting
- Project funding and finance
- Project process and procedures
- Property finance and funding
- Property management
- Property management accounting
- Property records/information systems
- Purchase and sale
- Quantification and costing of construction works
- Quantification, costing and price analysis
- Remote sensing and photogrammetry
- Research methodologies and techniques
- Risk management
- Spatial data capture and presentation [advanced mapping]
- Stakeholder management
- Strategic real estate consultancy
- Supplier management
- Surveying land and sea
- Taxation
- Use of marine environment
- Valuation
- Valuation of businesses and intangible assets

- Valuation reporting and research
- Waste management
- Works progress and quality management

Access and rights over land

Level 1

Demonstrate knowledge and understanding of the legislation and/or framework for acquiring sites or access for the provision of power, water, pipelines, other third party or communications infrastructure. This should include including the methodology and techniques used in valuation for these purposes.

Level 2

Provide evidence of identifying and understanding the appropriate routing for lines, cables and other third party infrastructure. This should include associated environmental assessment; undertaking inspections, and evaluating and negotiating payments for their use or acquisition.

Level 3

Provide evidence of reasoned advice, undertake valuations on and write reports in relation to all matters relating to provision of power, water, pipelines, other third party or communications infrastructure.

Agriculture

Level 1

Demonstrate knowledge and understanding of the principles, characteristics and organisation of agriculture according to different geographical, soil and climatic conditions.

Level 2

Demonstrate application of the principles and systems of practical farming methods. This includes the requirements and characteristics of yields; current market prices of agricultural produce and livestock; costs of production; and the utilisation and cost of farm buildings.

Level 3

Provide evidence of reasoned advice given to stakeholders on the management and practical application of appropriate methods and requirements of farming.

Analysis of client requirements

Level 1

Demonstrate knowledge and understanding of the need to collect data, analyse and define the needs of clients.

Level 2

Provide evidence of the practical application of that knowledge and understanding. This should include the development of strategies and methodologies and, where appropriate, undertaking feasibility studies, design proposals and costings.

Level 3

Provide evidence of developing appropriate strategies to meet the client's requirements under minimum supervision, based on analysis and interpretation. Demonstrate the ability to report on and present tailored strategies to the client.

Asset identification and assessment

Level 1

Demonstrate knowledge and understanding of the identification and assessment of intangible and business assets.

Level 2

Apply your knowledge and understanding of what constitutes intangible and business assets, the nature and character of the asset and different forms of ownership.

Level 3

Provide evidence of reasoned advice on complex asset identification issues, the nature of assets, liability or business asset to be valued.

Asset management

Level 1

Demonstrate knowledge and understanding of the aims, objectives, strategies and processes, managing assets in the built infrastructure arena.

Level 2

Apply your knowledge to the processes and activities necessary including systematic record keeping, developing strategies of planned maintenance, repair and replacement and managing information systems.

Level 3

Provide evidence of reasoned advice, based upon the knowledge and experience gained, in order to improve decision-making in asset management.

Auctioneering

Level 1

Demonstrate knowledge and understanding of the basic principles and legal obligations of auction. This should include preparation for, and procedures prior to or during, an auction.

Level 2

Provide evidence of the practical application of your knowledge to the preparation for the sale of property at auction and procedures prior to or during an auction.

Level 3

Provide evidence of reasoned advice based on a thorough working knowledge and experience of the auction process, including experience of selling at auction.

Building control inspections

Level 1

Undertake building inspections at stages of work in progress in order to assess compliance with building legislation.

Level 2

Demonstrate the ability to observe, assess and take authoritative action in respect of contraventions of building legislation on site.

Level 3

Demonstrate the application of specialist knowledge to the resolution of complex problems and contraventions of building legislation; demonstrate understanding of collapse of structures and measures necessary to ensure public safety.

Building information modelling (BIM)

Level 1

Demonstrate knowledge and understanding of the technical, process and collaborative aspects of the use of BIM on projects.

Level 2

Develop and apply management systems to facilitate the use of BIM on projects, including unified control and reporting procedures.

Level 3

Demonstrate how the knowledge and experience gained in this competency has been applied to advising clients and/or senior management on BIM strategy.

Building pathology**Level 1**

Demonstrate your knowledge and understanding of building defects including collection of information, measurements and tests.

Level 2

Apply your knowledge to undertake surveys, use survey and other information to diagnose cause and mechanisms of failure.

Level 3

Provide evidence of reasoned advice and appropriate recommendations, including the preparation and presentation of reports.

Cadastre and land management**Level 1**

Demonstrate knowledge and understanding of field and office procedures for boundary and/or cadastral surveys appropriate to your national and/or international location. Understand legal and physical boundaries and provide examples of these. Understand the principles of land management.

Level 2

Apply your knowledge of the principles of land registration, land management, administration and legislation related to rights in real estate internationally and nationally. Understand the relationship between the surveyor, client and legal profession and preparation of evidence for the legal process.

Level 3

Provide evidence of reasoned advice, and fully understand the role and responsibility of an expert witness, on the resolution of disputes by litigation and alternative procedures.

Capital allowances**Level 1**

Demonstrate knowledge and understanding of capital allowances and grants.

Level 2

Apply knowledge of capital allowances and grants, including the ability to use source documents necessary to prepare taxation allowances analyses.

Level 3

Provide evidence of giving reasoned advice; preparing claims; making applications for grants; preparing and presenting reports to clients; and corresponding and negotiating with the relevant government and other authorities.

Capital taxation**Level 1**

Demonstrate knowledge and understanding of the relevant provisions for capital taxation of real estate, equipment and/or other property.

Level 2

Undertake valuations and negotiations for a variety of different property types using different valuation methods for the purposes of capital taxation.

Level 3

Provide evidence of reasoned advice to stakeholders (to include senior management within your organisation, clients and courts/tribunal members) in respect of specific cases and/or other capital taxation issues.

Commercial management of construction**Level 1**

Demonstrate knowledge and understanding of the principles of management of construction projects.

Level 2

Apply your knowledge to the financial management of construction projects, including regular monitoring and reporting on cash flow and profitability.

Level 3

Monitor, report and advise on project cash flows and profitability; evaluate and advise on the financial implications and appropriate management action

Compulsory purchase and compensation**Level 1**

Demonstrate knowledge and understanding of the powers and procedures of government and other bodies in relation to the compulsory purchase and compensation. This should cover interests in real estate and of the rights of owners and occupiers of the various interests in property.

Level 2

Assist in the preparation of the various stages involved in the process of compulsory purchase including the estimation of a claim for compensation.

Level 3

Provide evidence of reasoned advice in relation to the validity and level of a claim for compensation, using a variety of valuation methodologies appropriate for the circumstances of the claim. Take an active role in the negotiation of claims, using a variety of bases of statutory and other valuation methodologies. Provide reasoned advice on the role of compulsory purchase in facilitating planning and regeneration initiatives.

Conservation and restoration**Level 1**

Demonstrate knowledge and understanding of the principles, techniques and methods applied to conservation and restoration.

Level 2

Undertake an inspection or object identification* to identify all the relevant factors that may affect the conservation or restoration of the subject matter.

Level 3

Provide evidence of reasoned advice on the conservation or restoration of the subject matter and/or manage the conservation or restoration process.

Construction technology and environmental services**Level 1**

Demonstrate knowledge and understanding of the principles of design and construction relating to your chosen field of practice.

Level 2

Apply your knowledge to the design and construction processes.

Level 3

Advise on the selection and application of particular processes within your area of experience. This should include liaison with specialists and consultants to develop project specific design and construction solutions.

Consultancy services**Level 1**

Demonstrate knowledge and understanding of the procurement and execution of advisory and strategic consultancy services in the context of the real estate and construction sectors.

Level 2

Apply your knowledge of the provision of consultancy services in the context of the real estate and construction sectors.

Level 3

Provide evidence of reasoned advice by preparing and presenting consultancy reports, together with relevant analysis to clients, in the context of the real estate and construction sectors.

Contaminated land**Level 1**

Demonstrate knowledge and understanding of how land becomes contaminated through human activities and natural occurrences. Clearly illustrate the implications of contamination for real estate valuation, development and management.

Level 2

Prepare a brief and/or specification for the appointment of a specialist(s) to undertake a site investigation.

Level 3

Supervise a site investigation, interpret the results of laboratory analyses and make recommendations as to remedial treatments.

Contract administration**Level 1**

Demonstrate knowledge and understanding of the contractual, legislative, and statutory terminology/requirements of a construction contract.

Level 2

Implement administrative procedures necessary for the smooth running of a construction contract.

Level 3

Advise on the administrative procedures necessary for the smooth running of a construction contract including document control techniques and systems, meetings and reporting procedures.

Contract practice**Level 1**

Demonstrate knowledge and understanding of the various forms of contract used in the construction industry and/or your area of business.

Level 2

Apply your knowledge of the use of the various standard forms of contract at project level, including the implications and obligations that apply to the parties to the contract.

Level 3

Provide evidence of reasoned advice, prepare and present reports on the selection of the appropriate form of contract and warranties for your chosen procurement route. This should include advising on the most appropriate contractual procedure at the various stages of a construction or other contract.

Corporate finance**Level 1**

Demonstrate knowledge and understanding of the principles and practices underlying the structuring and financing of corporate transactions, with particular reference to the role of real estate within these transactions.

Level 2

Apply your knowledge and understanding to assist in advising corporate organisations on the capital structure options relating to both occupational and surplus real estate. This should include the calculation and modelling of the cost of capital, plus a working knowledge of the regulatory framework within which the corporate finance marketplace operates.

Level 3

Give reasoned advice on the effects of different corporate financing techniques and structures on real estate (or plant and machinery) holdings in a corporate context. This should include impacts on accounts and contributions to both merger and acquisition activity, as well as general corporate financing/restructuring transactions.

Corporate real estate management**Level 1**

Demonstrate knowledge and understanding of the role of real estate in the context of the corporate occupier.

Level 2

Apply your knowledge to the management of corporate real estate under appropriate supervision.

Level 3

Provide evidence of reasoned advice on corporate real estate strategy to the corporate occupier in order to meet business needs.

Corporate recovery and insolvency**Level 1**

Demonstrate knowledge and understanding of the role of the Chartered Surveyor in corporate recovery and insolvency situations.

Level 2

Demonstrate an understanding of the various types of appointment that can be made to administer/manage the affairs of insolvent and potentially insolvent companies and individuals.

Level 3

Provide evidence of reasoned advice, prepare and present reports on the property assets of insolvent companies and individuals and/or in the administration of Fixed Charge Receivership appointments.

Cost prediction and analysis

Level 1

Demonstrate knowledge and understanding of the main factors that affect design economics over the life of the asset. Demonstrate knowledge and understanding of how cost benchmarking and cost planning assists in the financial control of projects from inception to the commitment to proceed.

Level 2

Apply the knowledge to the cost management of design development and the whole life cycle. Prepare and submit cost data to in-house and/or external data collection agencies.

Level 3

Give strategic and reasoned advice, including the preparation and presentation of reports with reference to cost, time, quality, logistics and methodology. Advise on various market factors and trends in costs. Comment on accuracy and risk.

Cross cultural awareness in global business

Level 1

Demonstrate knowledge and understanding of the way business is undertaken in different cultures, including the differing drivers, ethos, etiquette and assumptions prevalent in global business.

Level 2

Apply the knowledge to different business skills, including client liaison, team-working, leadership, negotiation and communication.

Level 3

Provide evidence of reasoned advice to clients and senior management on strategies and tactics for dealing with cultural issues in global business in order to ensure effective corporate and project performance.

Design and specification

Level 1

Demonstrate knowledge and understanding of the design process, and the scope and content of related documentation.

Level 2

Prepare designs and specifications, including at outline and detail levels.

Level 3

Co-ordinate and manage the design and specification processes on projects.

Design economics and cost planning

Level 1

Demonstrate knowledge and understanding of the main factors that affect design economics over the whole life of a building. Demonstrate knowledge and understanding of how cost planning assists in the financial control of projects during the design development stage.

Level 2

Apply your knowledge to the cost management of design development on a project from feasibility to design completion. Prepare and submit cost data to in-house and/or external data collection agencies.

Level 3

Give strategic and reasoned advice, including the preparation and presentation of reports with reference to cost, time, quality and buildability. Advise on various market factors and trends in construction costs. Comment on accuracy and risk.

Development appraisals

Level 1

Demonstrate knowledge and understanding of the principles and practices underlying a valid development appraisal.

Level 2

Identify, select, assemble and analyse data relevant to carrying out development appraisals. Undertake appraisals using relevant techniques and methodology and identify possible sources of development funding.

Level 3

Interpret and provide evidence of reasoned advice on development appraisals and further opportunities.

Development/project briefs

Level 1

Demonstrate knowledge and understanding of the information required to prepare a development brief or project brief.

Level 2

Apply your knowledge to identify, select, assemble and analyse information relevant to the preparation of development briefs or outline project briefs.

Level 3

Apply information in the preparation and presentation of development briefs or detailed design briefs, or parts thereof.

Due diligence**Level 1**

Demonstrate knowledge of the techniques used for cost, quality and time related forensic examinations in your area of practice.

Level 2

Apply your knowledge of cost, quality and time related forensic examinations in your area of practice.

Level 3

Provide evidence of reasoned advice and report to clients on cost, quality and time related forensic examinations in your area of practice.

Economic development**Level 1**

Demonstrate knowledge and understanding of the principles and practices underlying sound economic development policies in the context of international, national, regional and local economic issues. This should include inward investment strategies and urban regeneration strategies.

Level 2

Identify and fully understand the organisational processes and mechanisms involved in implementing economic development policies, and their impact on urban regeneration, property development and built infrastructure provision.

Level 3

Undertake initial feasibility studies and analysis as a preliminary to advising clients on appropriate economic development strategies.

Engineering science and technology**Level 1**

Demonstrate knowledge and understanding of the principles of the design, methodology, logistics and construction of the chosen field of practice.

Level 2

Apply the knowledge to an understanding of the systems, components, timing, methodologies and logistics of the construction of built infrastructure projects in the chosen field of practice.

Level 3

Advise on the selection and application of particular processes within the area of experience, This should include liaison with specialists and consultants to develop project-specific design and construction solutions.

Engineering surveying**Level 1**

Demonstrate knowledge and understanding of the principles of construction setting out, deformation and as-built surveys. Be fully conversant with all forms of construction drawings, plans and surveys.

Level 2

Apply your knowledge on site and be aware of safety, site management procedures and civil engineering/structural principles.

Level 3

Plan, specify and give reasoned advice on engineering surveys; define and assess accuracies and tolerances; manage the engineering surveying element in large projects; and understand the principles of good engineering practice.

Environmental assessment**Level 1**

Demonstrate knowledge and understanding of appropriate environmental assessment concepts, processes and systems. This should include responsibilities imposed by law, codes of practice and other regulations relating to environmental assessment.

Level 2

Apply in practice your understanding of environmental assessment and the requirements for compliance, including undertaking an environmental assessment.

Level 3

Provide evidence of reasoned advice including the preparation and production of reports based on appropriate environmental assessments.

Environmental audit (and monitoring)**Level 1**

Demonstrate knowledge and understanding of appropriate environmental auditing concepts, processes, systems and the role of the environmental audit in environmental monitoring.

Level 2

Apply in practice your understanding of environmental auditing and monitoring, as appropriate.

Level 3

Provide evidence of reasoned advice including the preparation and production of reports based on appropriate environmental audits.

Environmental management**Level 1**

Demonstrate knowledge and understanding of appropriate environmental management concepts, processes, and systems.

Level 2

Apply your understanding of appropriate environmental management concepts, processes, and systems.

Level 3

Maintain and report on environmental management and/or environmental management systems.

Environmental science and processes**Level 1**

Demonstrate knowledge and understanding of the environmental sciences, with particular references to the impact of human activities on ecologies, the soil, water and air. Clearly illustrate the importance of environmental sciences in the design of buildings, materials employed in construction, the use of land and buildings, equipment and other property types.

Level 2

Interpret specialist reports and/or specifications in order to advise as to possible present and future environmental implications.

Level 3

Specify works and materials, including design detailing, to ensure achievement of environmental objectives.

Financial modelling**Level 1**

Demonstrate a basic understanding of the main financial modelling software packages and how these may be used to create a financial model which illustrates the risk and returns available in a development and investment scenario.

Level 2

Apply your knowledge to produce bespoke financial models including full property analysis and cash flows from base information reflecting the individual investment or development characteristics.

Level 3

Use financial models to provide detailed reasoned advice on the performance of investment and development scenarios. Carry out a full sensitivity analysis taking into account a range of inputs and assumptions. Be able to segregate performance between senior debt and equity returns using the model to illustrate this.

Fire safety

Level 1

Demonstrate knowledge and understanding of the consequences of fire in a building, how it is modified by the enclosure and how the impact may be controlled. Apply fire safety principles to practical situations so as to minimise the risk from fire to personal injury or death, physical loss and adverse environmental impact.

Level 2

Demonstrate knowledge and understanding of the combustion process; the physics and chemistry of fire; the physiological and psychological effects of fire; and the ability to assess means of escape systems according to circumstance, including fire safety management systems.

Level 3

Apply the principles and understanding by preparing a fire safety strategy for a moderately complex assembly or commercial building with multiple uses and a relatively high occupancy.

Forestry and woodland management

Level 1

Demonstrate the ability to describe the silvicultural requirements, and the tree identification and silvicultural characteristics, of the main commercial and amenity species. Demonstrate knowledge and understanding of current grant regimes.

Level 2

Demonstrate the ability to apply your understanding of silviculture to the establishment and management of different forest and woodland systems. Demonstrate an understanding of the practice of silviculture from seed through establishment of crops, through to thinning and harvesting. Demonstrate an understanding of current forestry policy and its impact on grant regimes.

Level 3

Demonstrate experience of the economics and financial implications of various types of forest and woodland systems; preparation and submission of forest and woodland grant scheme applications; calculation of timber

yields, forecasting, and use of plans and recording systems; carrying out valuation of trees and stands of timber; and drawing up of thinning and harvest programmes.

Geodesy

Level 1

Demonstrate knowledge and understanding of the principles of geodesy, Global Navigation Satellite Systems, global/regional/national geodetic reference systems, geoids, datums and projections.

Level 2

Apply your knowledge in practice, specify and plan surveys and instrumentation needs. Be aware of error sources and “fitness for purpose” of data. Use industry standard software and apply network adjustments and/or transformations.

Level 3

Provide evidence of reasoned advice on advanced practice and planning. Use advanced software and carry out adjustments and analysis. Advise on client specifications and final product needs.

GIS

Level 1

Demonstrate knowledge and understanding of the principles of geographic information science and systems. Be aware of industry standard GIS, data structures, types and their applications, and of appropriate capture and output systems.

Level 2

Apply your knowledge and assess data quality; define and use appropriate input and data transfer methods; analyse data and prepare databases; identify digital data sources and assess ‘fitness for use’. Understand and be aware of national and international data standards.

Level 3

Assess clients’ needs and advise them accordingly. Define specifications including data and process modelling, customise systems, carry out advanced spatial analyses, and manage data and observe data standards.

Ground engineering and subsidence

Level 1

Undertake appropriate investigations including site inspection to research site history and geology.

Level 2

Collate, analyse and interpret information gathered after initial research.

Level 3

Provide evidence of reasoned advice, prepare and present reports.

Housing aid or advice

Level 1

Demonstrate knowledge and understanding of the rights and responsibilities of landlords, tenants, licence holders, leaseholders, or shared owners in relation to legislation and statutory guidance. Be aware of the options available for obtaining housing aid or advice.

Level 2

Assist with the provision of housing aid or advice on landlord and tenant issues.

Level 3

Provide evidence of housing aid or reasoned advice on a range of landlord and tenant issues taking full account of legislation and statutory guidance.

Housing maintenance, repair and improvements

Level 1

Demonstrate knowledge and understanding of the roles of owners, occupiers, providers and local authorities in the maintenance, repair and improvement of housing. Demonstrate knowledge of funding methods available, legislative requirements, and property related health and safety issues.

Level 2

Apply your knowledge to assess the condition of housing, prepare reports and cost estimates. Advise on obtaining funding and prepare contracts in relation to the work programmes. Assess and advise on residents' needs.

Level 3

Manage work in progress and payments. Demonstrate and apply your understanding of defect liability and dispute resolution procedures.

Housing management and policy

Level 1

Demonstrate knowledge and understanding of the legislation and statutory regulations that are relevant to the management of housing.

Level 2

Apply your knowledge to day-to-day housing management functions, including the implementation of tenancy conditions, leases or licences, relevant legislation and statutory guidance.

Level 3

Provide evidence of reasoned advice including the preparation and presentation of reports relating to the formulation and implementation of housing management policy and good practice.

Housing strategy and provision

Level 1

Demonstrate knowledge and understanding of the various methods used to assess and identify overall housing needs. Be aware of the options available for housing providers to meet these housing needs.

Level 2

Apply your knowledge to identify and respond to housing needs. This should include house types, tenures, funding, planning, and other statutory or non-statutory considerations.

Level 3

Provide evidence of reasoned advice and contribute to the formulation and implementation of a housing strategy to meet identified housing needs.

Hydrographic (marine) surveying

Level 1

Demonstrate a working knowledge and understanding of the principles and limitations of hydrographic survey. Conduct measurements in the marine environment.

Level 2

Plan the conduct of marine surveys. Be fully aware of safety issues. Specify appropriate instrumentation and ensure correct calibration. Understand the principles of geodesy on a local and international basis, and its application in a marine environment. Fully understand the principles, application and limitations of navigation, geophysical and marine survey instrumentation and software.

Level 3

Assess the client's needs and define specifications, tenders and/or contracts. Manage marine surveys. Analyse the data collected and use it to prepare reports and briefings. Be conversant with the International Law of the Sea and/or maritime boundaries.

Indirect investment vehicles**Level 1**

Demonstrate knowledge and understanding of the principles of indirect investment including the different structures and instruments relating to the ownership and funding of real estate.

Level 2

Apply your knowledge to identify which structures might suit an investor or lender in any given scenario. Understand the management and risk issues that may differ from a more direct form of investment. Gain an appreciation of how investing indirectly can assist portfolio risk and return management.

Level 3

Assist in the analysis and preparation of reasoned advice covering the benefits or otherwise of indirect investment. Participate in the establishment and management of such vehicles and demonstrate an understanding of how these vehicles impact the larger direct market.

Inspection**Level 1**

Demonstrate knowledge and understanding of the different requirements for inspection, together with the required information and factors affecting the approach to an inspection.

Level 2

Undertake inspections and apply the information gained to prepare reports, schedules and/or registers of equipment, presenting appropriate information gained from the inspection.

Level 3

Provide evidence of reasoned advice and recommendations arising from inspections.

Insurance**Level 1**

Demonstrate knowledge and understanding of the principles and practices of insurance in relation to your area of practice.

Level 2

Apply your knowledge and/or be involved with the insurance of construction and/or property-related matters.

Level 3

Demonstrate a thorough understanding of the regulations and practice governing the insurance of construction and/or property-related matters.

Investment management (including fund and portfolio management)**Level 1**

Demonstrate knowledge and understanding of the principles of financial investment in property.

Level 2

Apply the principles of managing property as a financial investment.

Level 3

Provide evidence of reasoned and strategic advice on property as a financial investment, including the preparation and presentation of reports.

Laboratory procedures**Level 1**

Demonstrate knowledge and understanding of best practice in geo-environmental laboratories, including accreditation requirements and criteria.

Level 2

Determine an appropriate analytical suite, taking account of present and historic site activities, environmental setting and proposed uses.

Level 3

Interpret laboratory results and make recommendations as to further analytical requirements and/or other actions that may be needed.

Landlord and tenant (including rent reviews and lease renewals)

Level 1

Demonstrate knowledge and understanding of the law and practice relating to landlord and tenant.

Level 2

Apply the principles of the law and practice relating to landlord and tenant. Carry out relevant negotiations to provide solutions to issues affecting both owners and occupiers of real estate.

Level 3

Provide evidence of reasoned advice, prepare and present reports on the law and practice relating to landlord and tenant. Apply your knowledge to assist in undertaking relevant dispute resolution procedures.

Land use and diversification

Level 1

Demonstrate knowledge and understanding of how a variety of land uses, policies and options for diversification have an impact on real estate and business.

Level 2

Apply your knowledge to recognise and evaluate the economic, social and environmental needs of different land uses and options for diversification in relation to location and markets.

Level 3

Provide evidence of reasoned advice, write reports and undertake the management of land use and, where appropriate, diversification and related projects.

Leasing/letting

Level 1

Demonstrate knowledge and understanding of how various types of property are let (or a similar interest is acquired for a client) and the different types of interests that may be placed on the market. Demonstrate an understanding of the economics of the market for such interests and the appropriate legal frameworks.

Level 2

Apply your knowledge and skills to the leasing/letting of all types of property and demonstrate practical experience of the associated decision-making process, marketing, reporting and completion of the transaction. Demonstrate knowledge and understanding of other forms of property transaction, and of the reasons supporting the decision to proceed along the chosen leasing or letting route.

Level 3

Provide evidence of reasoned advice and report to clients on all types of leasing or letting transactions. Demonstrate the ability to see complex cases through from start to finish with appropriate assistance. Be able to provide clients with a holistic view of the entire transactional market, and advise them clearly and appropriately, not only on the letting or leasing market, but also on other areas.

Legal/regulatory compliance

Level 1

Demonstrate knowledge and understanding of any legal/regulatory compliance requirements in relation to your area of practice.

Level 2

Apply your knowledge to comply with legal/regulatory requirements in specific situations within your area of practice.

Level 3

Provide evidence of reasoned advice, prepare and present reports on legal/regulatory compliance requirements in relation to your area of practice.

Local taxation/assessment

Level 1

Demonstrate knowledge and understanding of the provisions for taxation of real estate, plant and machinery and/or other property types at a local/municipal level.

Level 2

Undertake valuations and negotiations for a variety of different property types using different valuation methods for the purposes of local/municipal taxation.

Level 3

Provide evidence of reasoned advice to stakeholders (including senior management within your organisation, clients and courts/tribunal members) in respect of specific cases and/or other local taxation issues.

Maintenance management

Level 1

Demonstrate knowledge and understanding of the maintenance requirements of buildings, structures and other real estate.

Level 2

Manage and keep up-to-date maintenance information to determine and implement operational maintenance policies.

Level 3

Provide evidence of reasoned advice, write and present reports on maintenance management.

Management of the built environment

Level 1

Demonstrate knowledge and understanding of the importance of sustainable management of the built environment as part of the urban planning and regeneration process.

Level 2

Apply your knowledge of sustainable management of the built environment as part of the urban planning and regeneration process. Demonstrate an understanding of the roles played by public, private and not-for-profit sectors.

Level 3

Provide evidence of reasoned advice, write reports and negotiate on all matters relating to sustainable management of the built environment as part of the urban planning and regeneration process. This should include the roles played by public, private and not-for-profit sectors.

Management of the natural environment and landscape

Level 1

Demonstrate knowledge and understanding of the importance and role of nature conservation and the landscape in real estate, business management and development.

Level 2

Apply your knowledge of nature conservation and landscape in the management of real estate and development.

Level 3

Provide evidence of reasoned advice, write reports and negotiate on all matters relating to nature conservation and landscape.

Mapping

Level 1

Demonstrate knowledge and understanding of the principles of mapping and geographic information sciences appropriate to your area of practice. Be aware of accuracy, scale, currency and fitness for purpose of hardcopy and/or digital maps, drawings, imagery and plans.

Level 2

Apply your knowledge of mapping and geographical sciences in relation to your area of practice.

Level 3

Provide evidence of reasoned advice on the design and specification of mapping and/or geoinformation projects in a national and/or international context.

Measurement of land and property

Level 1

Demonstrate knowledge and understanding of the principles and limitations of measurement relevant to your area of practice.

Level 2

Apply your knowledge to undertake measurement. Use basic and/or advanced instrumentation to collect data. Present appropriate information gained from measurement.

Level 3

Evaluate, present, manage, analyse data and/or apply spatial data and information. Show an advanced understanding of accuracy, precision and error sources.

Minerals management

Level 1

Demonstrate a broad appreciation of geology, exploration techniques (including site investigation), and surface and/or underground mining methods.

Level 2

Analyse site investigations and interpret results. Demonstrate an appreciation of the economic and technical viability and/or management of mineral extraction and restoration.

Level 3

Design, give advice on, and/or manage mineral exploitation schemes, their implementation and/or property interests therein.

Object identification

Level 1

Demonstrate knowledge and understanding of the object identification checklist, including the characteristics to be observed to be able to complete an object identification.

Level 2

Apply your knowledge of object identification.

Level 3

Demonstrate the ability to give reasoned advice based on your assessments of objects.

Option appraisal

Level 1

Demonstrate knowledge and understanding of option appraisal methods.

Level 2

Apply relevant methods for carrying out option appraisal, including the selection, assembly and analysis of data.

Level 3

Provide evidence of reasoned oral and written advice on option appraisal to support business planning and decision making.

Planning

Level 1

Demonstrate knowledge and understanding of the principles of planning.

Level 2

Apply your knowledge to matters relevant to the planning process.

Level 3

Provide evidence of reasoned advice, including the preparation and presentation of reports, on planning matters. Brief other professional consultants. Demonstrate your understanding of the application of specialist knowledge to the resolution of planning problems.

Procurement and tendering

Level 1

Demonstrate knowledge and understanding of the main types of procurement. Demonstrate knowledge and understanding of the tendering and negotiation processes involved in procurement.

Level 2

Apply your knowledge to the implementation of the procurement routes selected for your projects and to carrying out tendering and negotiation processes relevant to them.

Level 3

Give reasoned advice on the appropriateness of various procurement routes. Manage the tendering and negotiation process and present reports on the outcome.

Programming and planning**Level 1**

Describe the principles of financial and programme monitoring of projects, including planning techniques such as Gantt charts etc. Demonstrate knowledge and understanding of the various types of programmes and schedules commonly used on projects.

Level 2

Assess, interpret and report on the programme control of projects.

Level 3

Provide evidence of reasoned advice on, or implement the principles of executive programme control of projects. Your advice should demonstrate a good understanding of planning techniques [pert diagrams, network analysis/critical path method].

Project administration**Level 1**

Demonstrate knowledge and understanding of contractual, legislative and statutory terminology/requirements in the management of a project.

Level 2

Implement management procedures necessary for the smooth running of a project.

Level 3

Advise on the management procedures necessary for the smooth running of a project including document control techniques and systems, meetings and reporting procedures.

Project audit**Level 1**

Describe the essential requirements of a project audit/close-out report.

Level 2

Explain the procedures associated with producing a project audit/close-out report.

Level 3

Undertake and report on a project audit/close-out report.

Project controls**Level 1**

Demonstrate knowledge and understanding of the tools and techniques associated with project controls, including work breakdown structures, Earned Value Management, productivity and resource analysis and programming.

Level 2

Interpret, analyse and report upon data produced by project control techniques to facilitate both forensic and predictive decision-making.

Level 3

Advise on strategies and procedures to analyse, predict and control time and cost on built infrastructure projects.

Project evaluation**Level 1**

Describe the feasibility study process, including the financial and town planning aspects associated with a development appraisal.

Level 2

Apply the techniques used in value management/value engineering, life cycle/whole life costing and risk assessment, together with a balance sheet analysis.

Level 3

Initiate and monitor a feasibility study. Advise on the economics of design, on the use of value management and value engineering techniques, and on how to undertake a full risk and balance sheet analysis.

Project financial control and reporting

Level 1

Demonstrate knowledge and understanding of the effective control of costs during a project. Demonstrate understanding of the legal and contractual constraints and the effect of time and quality on the cost of a project.

Level 2

Apply your knowledge to the management of project costs. This should include the preparation and presentation of financial reports on the performance of a project at appropriate intervals to provide effective forecasting of costs, risks and their financial implications.

Level 3

Advise on strategies and procedures to control predicted expenditure in line with a budget.

Project funding and finance

Level 1

Demonstrate knowledge and understanding of funding sources and the principal forms of investment finance in built infrastructure projects. Demonstrate knowledge and understanding of the key project finance evaluation techniques, including their assumptions and limitations.

Level 2

Apply the knowledge to identify the factors that affect the ability to obtain finance to fund a built infrastructure project and the use of project finance evaluation techniques on built infrastructure projects.

Level 3

Provide evidence of reasoned advice to clients and senior management on strategies and tactics for dealing with funding and finance issues on built infrastructure projects.

Project process and procedures

Level 1

Describe all the stages of the project development process.

Level 2

Apply the principles of the project development process and relate these to the aims and structure of the client's organisation.

Level 3

Provide evidence of reasoned advice to the client on the detailed procedures associated with the project development process.

Property finance and funding

Level 1

Demonstrate knowledge and understanding of the role and importance of finance in property, including the principal forms of investment finance and their sources.

Level 2

Identify the factors that affect the ability to obtain finance to fund any investment project. Identify appropriate sources of finance and understand the principles that apply to securing finance for different purposes.

Level 3

Provide evidence of reasoned advice on maximising the viability of any funding situation. Demonstrate your appreciation of the impact of property matters on valuation and funding. Demonstrate your understanding of the impact of funding matters on the property market.

Property management

Level 1

Demonstrate knowledge and understanding of property management and the relationship between owner and occupier.

Level 2

Apply the principles of property management to provide solutions to issues affecting both owners and occupiers of real estate.

Level 3

Provide evidence of reasoned advice including the preparation and presentation of reports in relation to property management.

Property management accounting

Level 1

Demonstrate knowledge and understanding of any legal or regulatory principles (including taxation implications where appropriate) that apply to property management accounts and service charge accounts.

Level 2

Undertake day-to-day management and recording of property management accounts and service charge accounts.

Level 3

Prepare final accounts and tax returns, and report (applying statutory and regulatory standards) on property management accounts and service charge accounts.

Property records/information systems

Level 1

Demonstrate knowledge and understanding of the factors required for property records/information systems, including the sourcing and collation of data.

Level 2

Demonstrate your ability to apply knowledge to analyse data and assemble it for use in a database.

Level 3

Demonstrate your ability to extract data from property records/information systems in order to use and present data for specific purposes.

Purchase and sale

Level 1

Demonstrate knowledge and understanding of how various types of property are sold (or a similar interest is acquired for a client) and the different types of interests that may be placed on the market. Demonstrate an understanding of the economics of the market for such interests, and the appropriate legal frameworks.

Level 2

Apply your knowledge and skills to the purchase or sale of all types of property and demonstrate practical experience of the associated decision making process, marketing, reporting and completion of the transaction. Demonstrate knowledge and understanding of other forms of property transaction, and be aware of the reasons supporting the decision to proceed along the chosen purchase or sale route.

Level 3

Provide evidence of reasoned advice and report to clients on all types of purchase or sale transactions. Demonstrate the ability to see complex cases through from start to finish with appropriate assistance. Be able to provide the client with an holistic view of the entire transactional market, and advise him/her clearly and appropriately, not only on the sale or disposal market but also on other areas.

Quantification and costing of construction works

Level 1

Demonstrate knowledge and understanding of the principles of quantification and costing of construction works as a basis for the financial management of contracts.

Level 2

Apply your knowledge to the quantification and costing of construction works, including the use of appropriate standard methods of measurement and forms of cost analysis. Carry out measurement and costing of works at all stages of the construction process.

Level 3

Advise on appropriate methods of quantification and costing for specific projects. Take responsibility for preparing and issuing pricing documents. Price or analyse such documents. Give advice on and/or supervise the valuation of construction works throughout a project.

Quantification, costing and price analysis

Level 1

Demonstrate knowledge and understanding of the principles of quantification, costing and rate price analysis of works as a basis for the financial management of projects.

Level 2

Apply the knowledge to the quantification and costing of works, including the use of appropriate standard methods of measurement and forms of benchmarking and cost analysis. Apply price rate analysis in both forensic and predictive techniques.

Level 3

Advise on strategies and procedures to analyse, predict and control time and cost on projects. Take responsibility for preparing and issuing pricing documents. Price or analyse such documents.

Remote sensing and photogrammetry**Level 1**

Demonstrate knowledge and understanding of the principles of remote sensing and photogrammetry [both aerial and terrestrial].

Level 2

Apply your knowledge and be aware of scales, camera and satellite principles and different data capture techniques. Understand and undertake procedures for routine data capture, and analyse and/or adjust/transform data. Use standard industry software.

Level 3

Provide evidence of fit-for-purpose advice on client requirements. Identify and assess client specifications. Use advanced industry software and advise on data transfer and/or format.

Research methodologies and techniques**Level 1**

Demonstrate your ability to collect and collate appropriate data and other relevant material. Demonstrate familiarity with data and other sources, and with data handling and manipulation techniques.

Level 2

Demonstrate the effective and appropriate analysis and interpretation of data and other material. Demonstrate your ability to make effective use of appropriate research methodologies and techniques, and to match your choice of methodologies to client requirements.

Level 3

Demonstrate effective application of analysis and interpretation of research. Demonstrate your ability to apply the analysis to client requirements.

Risk management**Level 1**

Demonstrate your knowledge and understanding of the nature of risk and, in particular, of the risks associated with your area of business/practice.

Level 2

Apply your knowledge to carry out risk assessments taking into account all relevant factors. Understand the application of the various methods and techniques used to measure risk.

Level 3

Provide evidence of reasoned advice and implement systems to manage risk by competent management in relation to specific projects.

Spatial data capture and presentation (advanced mapping)**Level 1**

Demonstrate knowledge and understanding of the principles and basic working practices of data capture, digital and/or graphical cartography and mapping.

Level 2

Apply your knowledge of data capture error sources, instrument calibration and limitations. Use mapping/cartographic survey software, understand production processes and digital data capture [scanning and/or digitisation], and carry out surveys through to end product.

Level 3

Provide evidence of reasoned advice on cartographic, data management and data capture, mapping specifications and survey tenders.

Stakeholder management

Level 1

Demonstrate knowledge and understanding of the principles and techniques associated with engaging and communicating with all relevant project stakeholders, including an understanding of decision-making in pluralistic clients.

Level 2

Apply the knowledge to ensure that all parties are aligned with the project objectives using identification, analysis, matrix and engagement techniques.

Level 3

Provide evidence of reasoned advice and implement systems to manage risk by competent management in relation to specific projects.

Strategic real estate consultancy

Level 1

Demonstrate knowledge and understanding of the business context of real estate, and an appreciation of the role of the real estate professional as a strategic adviser.

Level 2

Apply your knowledge and understanding of the business context of real estate in a corporate or other context.

Level 3

Provide evidence of reasoned oral and written advice on the principles and application of real estate knowledge.

Supplier management

Level 1

Demonstrate knowledge and understanding of how to manage suppliers using a logical process to ensure that the cost and quality of the service received meets organisational requirements.

Level 2

Apply your knowledge and understanding by using an existing process to manage suppliers to ensure that the cost and quality of the service received meets organisational requirements.

Level 3

Help define organisational requirements for supplier services and develop an appropriate approach to the management of an individual supplier or group of suppliers based on the scale of the service and the risk of service failure.

Surveying land and sea

Level 1

Demonstrate knowledge and understanding of the principles of geomatics and the various applications of its techniques within the natural, maritime and built environments.

Level 2

Apply your knowledge by identifying, planning and accessing survey requirements, specifications and appropriate instrumentation. Use industry standard survey and/or offshore software, and demonstrate an understanding of the principles, uses and limitations of Global Navigation Satellite Systems and other navigation systems.

Level 3

Define and assess client needs. Define specifications and prepare tenders and/or contracts. Demonstrate that you are fully conversant with the principles of geodesy on a national, international and/or maritime basis

Taxation

Level 1

Demonstrate knowledge and understanding of the relevant provisions, general criteria and statutory framework for taxation of different classes of assets.

Level 2

Apply your knowledge and understanding of the principal valuation directing provisions in relation to capital taxation, capital allowances, corporate intangibles regime and transfer pricing.

Level 3

Provide evidence in relation to asset taxation matters and the conduct of negotiations with national taxation authorities.

Use of the marine environment

Level 1

Demonstrate an understanding of the principles of inshore and offshore resource development, exploitation and/or conservation. Be aware of the relevant legal guidance and environmental issues.

Level 2

Apply these principles to planning for the exploitation and/or use of marine resources. Use appropriate marine data capture and analysis software and/or instrumentation.

Level 3

Oversee the conduct of operations to use and/or exploit marine resources. Analyse the data collected and prepare reports and briefings on the data collected. Advise on national and international policy on ocean and inshore resource management.

Valuation

Level 1

Demonstrate knowledge and understanding of the purposes for which valuations are undertaken; the relevant valuation methods and techniques; the appropriate standards and guidance; and any relevant statutory or mandatory requirements for valuation work.

Level 2

Demonstrate practical competence in undertaking both capital and rental valuations and detailed involvement with the preparation and presentation of client reports. Demonstrate your ability to use valuation methods and techniques appropriate to your area of practice. Show how the relevant valuation standards and guidance have been applied to your valuation experience.

Level 3

Demonstrate practical competence in undertaking valuations, either of a range of property types or for a range of purposes. Demonstrate the application of a wide range of valuation methods and techniques. Be responsible for the preparation of formal valuation reports under proper supervision and provide reasoned advice. Demonstrate a thorough knowledge of the appropriate valuation standards and guidance and how they are applied in practice.

Valuation of businesses and intangible assets

Level 1

Demonstrate knowledge and understanding of the purposes for which valuations of businesses and/or intangible assets are undertaken; the relevant valuation methods and techniques; the appropriate standards and guidance; and any relevant statutory or mandatory requirements for this type of valuation work.

Level 2

Apply your knowledge and understanding of business valuations showing detailed involvement with the preparation and presentation of client reports. Demonstrate your ability to use the valuation methods and techniques appropriate to your area of practice. Show how any relevant standards and guidance have been applied to your experience.

Level 3

Demonstrate practical competence in undertaking business valuations and their component parts for a range of purposes. Demonstrate the application of the relevant valuation methods and techniques and a thorough knowledge of the appropriate valuation standards and guidance and how they are applied in practice.

Valuation reporting and research

Level 1

Demonstrate knowledge and understanding of the nature and context of valuation reports, research analysis, interpretation and validation of information.

Level 2

Apply your knowledge of valuation reporting and research to analyse and interpret key inputs for appraisal purposes, benchmarking techniques, valuation context and settings.

Level 3

Provide evidence of reasoned advice in relation to valuation reports, valuation standards, methodologies, validation and interpretation of inputs and data.

Waste management

Level 1

Demonstrate a broad appreciation of practical aspects of waste management and regulatory regime. Undertake inspections of waste management facilities.

Level 2

Demonstrate an appreciation of the economic and technical viability and/or management application of the practical requirements and monitoring of waste facilities.

Level 3

Design, advise on, and/or manage waste management schemes, their implementation and/or property interests therein.

Works progress and quality management

Level 1

Inspect and record progress and quality of building works.

Level 2

Report and advise on the adequacy of progress and the quality of building works.

Level 3

Manage and co-ordinate progress and quality of building works as a contract administrator/supervising officer or equivalent.

Where to find help

RICS.org

The RICS website provides comprehensive information and guides on RICS membership, pathways, and the RICS Rules of Conduct and ethics.

rics.org/apc – information and candidate guides on RICS membership assessment

rics.org/pathway – information and guides on all pathways

rics.org/regulation – information and guides on the RICS Rules of Conduct and ethics

RICS practice standards

rics.org/practicestandards

The broad programme of mandatory and advisory practice standards (practice statements, codes of practice, and guidance notes) provide best practice and advise on all areas of practice.

You will have access to all the practice standards when you enrol on the APC.

RICS Training

rics.org/training

The training catalogue offers face-to-face and online courses on technical and management skills, and various elements of the APC.

RICS Books

ricsbooks.com

The book catalogue includes technical and management handbooks and guides on the APC and ethics.



Confidence through professional standards

RICS promotes and enforces the highest professional qualifications and standards in the development and management of land, real estate, construction and infrastructure. Our name promises the consistent delivery of standards – bringing confidence to the markets we serve.

We accredit 118,000 professionals and any individual or firm registered with RICS is subject to our quality assurance. Their expertise covers property, asset valuation and real estate management; the costing and leadership of construction projects; the development of infrastructure; and the management of natural resources, such as mining, farms and woodland. From environmental assessments and building controls to negotiating land rights in an emerging economy; if our members are involved the same professional standards and ethics apply.

We believe that standards underpin effective markets. With up to seventy per cent of the world's wealth bound up in land and real estate, our sector is vital to economic development, helping to support stable, sustainable investment and growth around the globe.

With offices covering the major political and financial centres of the world, our market presence means we are ideally placed to influence policy and embed professional standards. We work at a cross-governmental level, delivering international standards that will support a safe and vibrant marketplace in land, real estate, construction and infrastructure, for the benefit of all.

We are proud of our reputation and we guard it fiercely, so clients who work with an RICS professional can have confidence in the quality and ethics of the services they receive.

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